

Salesforce Einstein vs Microsoft Dynamics 365 AI: A Deep Dive into the Differences



Introduction

In recent years, no development, not even the Metaverse, has captivated the IT industry as much as generative AI. When Microsoft and Salesforce proclaimed the integration of ChatGPT into their CRM tools, it marked a major advancement for OpenAI's technology.

With this move, Salesforce has become the latest tech giant to join the GPT craze. Microsoft's decision to include ChatGPT in Microsoft Dynamics 365 signals an even more meaningful trend. The industry is poised to increasingly embed generative AI into traditional CRM systems, ushering in a new age of intelligent customer-business interactions.

Salesforce, with its Einstein platform, and Dynamics 365 AI, are both offering AI capabilities that promise to improve sales pipelines, customer service, and overall business operations. Before delving into a comparison of the AI integrations of both technologies, let's first grasp the essence of each one.

Salesforce Einstein

It's a robust natural language processing and generation tool, primarily aimed at understanding and responding to casual prompts or queries in a manner akin to human interaction. As a component of Salesforce's inclusive CRM suite, Einstein enables your business to effortlessly incorporate AI capabilities into your current customer management practices.

Microsoft Dynamics 365 Copilot

In Microsoft's AI suite, Dynamics AI Sales as well as Viva Sales unveiled Copilot, an intelligent assistant for sales executives. It helps with tasks like creating email responses and detailed meeting synopses in Outlook Teams, using CRM data for thorough summaries. Copilot in Microsoft Dynamics 365 Customer Insights and Marketing provides marketers tools for data discovery, audience categorization, and content creation, simplifying tailored customer segmentation and email campaign development.

Copilot's Impact: User Feedback and Productivity Metrics

According to research, here is the tangible productivity gains showing Copilot's transformative impact:

Across various tasks including searching, writing, and summarizing, users demonstrated a **29%** overall speed improvement.

70% of users reported increased productivity, with **68%** noting an improvement in work quality.

64% of users found Copilot reduced the time spent on email processing.

Users could quickly catch up on missed meetings, achieving nearly **4x** the speed.

75% of users reported that Copilot saves them time by locating whatever they need in their files.

85% of users experienced faster initial draft creation with Copilot's assistance.

77% of users expressed reluctance to part with Copilot after experiencing its benefits.



AI Benefits: Comparing CRM Platforms

Let's take a moment to consider and weigh the distinct advantages of AI within both CRM platforms to aid your understanding and informed decision-making.

| Benefits | Salesforce Einstein | Benefits | Microsoft Copilot |
|--|---|--|--|
| Tailored Marketing Campaigns | Enables creation of bespoke campaigns through AI-driven classification and content suggestions, enhancing customer engagement, rate of conversion, and marketing ROI. | Tailor-Made AI Assistant | Delivers related and tailored assistance based on the user's business data from Microsoft Graph, personalized to the user's responsibility, tasks, and organizational perspective. |
| Case Categorization and Article Suggestions | Automatically organizes cases and suggests related informative articles for quick and correct resolutions, improving customer satisfaction. | Improving Meetings and Collaboration | Seamlessly integrates into Teams, recording meetings, synthesizing discussions, capturing action items, and recommending related info or files. This boosts collaboration and ensures no vital details are overlooked. |
| Seamless Salesforce Cloud Integration | Effortlessly integrates with Sales, Marketing, Service, and Commerce Clouds, delivering cohesive and smart experience across the Salesforce environment. | Smooth Integration with Microsoft 365 | Unified into Microsoft 365 suite, ensuring a constant AI-enabled experience across Word, PowerPoint, Excel, Outlook, Teams, as well as other apps. |

| Benefits | Salesforce Einstein | Benefits | Microsoft Copilot |
|-------------------------------------|--|---|---|
| Tailored Actions and Prompts | Allows the creation of custom prompts and actions aligned with your exact business requirements, ensuring utmost efficiency and implementation. | Tailored Interactions with Copilot | Delivers an integrated "Copilot" experience across MS Graph, allowing customization of actions and prompts to suit individual requirements and workflows. |
| Predictive Analytics | <p>Predictive Lead Scoring: Evaluates leads according to their probability of conversion.</p> <p>Opportunity Insights: Forecasts the probability of deal closure and offers guidance for subsequent actions.</p> <p>Forecasting: Utilizes past data to anticipate future sales patterns and results.</p> | Predictive Analytics | <p>Predictive Lead Scoring: Analyzes lead information to forecast the likelihood of conversions.</p> <p>Sales Insights: Delivers in-depth analysis of sales effectiveness and future projections.</p> <p>Customer Insights: Examines customer behavior and anticipates forthcoming actions.</p> |
| NLP and Conversational AI | <p>Einstein Bots: Automated chatbots for engaging with customers.</p> <p>Einstein Language: Understanding emotions and intentions through analysis.</p> <p>Einstein Voice: Voice-activated AI streamlines data entry and task management without hands.</p> | NLP and Conversational AI | <p>Virtual Agents: Chatbots powered by Azure AI, driven by artificial intelligence.</p> <p>NLP Capabilities: Examines textual data to uncover insights and grasp sentiment nuances.</p> <p>Conversational AI: Improves collaboration by integrating with Microsoft Teams.</p> |
| Automation and Workflow | <p>Einstein Automate: Automates processes and tasks seamlessly with Flow as well as Process Builder.</p> <p>Task Automation: Generates tasks, alerts, and follow-ups automatically.</p> <p>Einstein Next-best Action: Provides sales and service teams with recommendations for optimal actions.</p> | Automation and Workflow | <p>Power Automate Integration: Creates and oversees automated workflows spanning various systems.</p> <p>Task Management: Automates the creation of tasks, scheduling, as well as follow-up processes.</p> <p>Sales and Service Automation: Streamlines efficiency by automating essential processes.</p> |

Making the Choice: Salesforce or Microsoft Dynamics 365 AI?

When choosing between Salesforce Einstein and Microsoft Dynamics 365 AI, you should assess your specific needs and goals.

For improving conversational chatbots, interfaces, and bespoke content, Einstein is perfect, thanks to its seamless integration with Salesforce's CRM processes.

However, for a wider variety of AI-enabled tools that improve various business operations, Microsoft Dynamics 365 AI is an all-encompassing solution. Its analytical lead scoring, chatbot integration, and customer sentiment evaluation boost customer satisfaction, efficiency, and revenue across multiple departments.

Salesforce Einstein and Dynamics 365 CRM Copilot provide robust AI features designed to elevate CRM capabilities. Selecting between the two depends on variables like your current technology infrastructure, unique business needs, and financial considerations.

Why Korcomptenz?

Nothing beats practical or the guidance of an experienced technology transformation company when navigating the intricacies of these platforms.

With over two decades of expertise in the CRM industry, Korcomptenz is exceptionally qualified to offer the essential direction, supervision, and support for businesses deciding between Salesforce and Microsoft Dynamics solutions.

Our CRM experts will:

- ◆ Perform a comprehensive business assessment to identify pain points that can be addressed with innovative technologies.
- ◆ Ensure smooth data integration between your existing solutions and Microsoft or Salesforce.
- ◆ Establish CRM analytics and reporting systems to visually represent precise and current information interestingly.
- ◆ Aid in consolidating sales processes as well as customer data in Microsoft Dynamics 365 or Salesforce.
- ◆ Help with dataset dereplication and improvement.

If you have been using Microsoft Dynamics or Salesforce for a while, our CRM consultants can perform a thorough feature gap evaluation or streamline your workflows. Interested in discovering how we can help with workflow automation? Contact us.

Feel free to contact us for further assistance

Discover how we #FocusOnYou at www.korcomptenz.com

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